

CITY OF SAN ANTONIO
TRANSPORTATION & CAPITAL IMPROVEMENTS

COSA PRIME*Link* Vendor User Guide

Updated to New User Interface

Feb 7 2020

Table of Contents

Payment Request.....	1
Checking on the Status of a Payment Request.....	7
Schedule of Values – As of Last Completed Pay Request.....	8
If Payment Request is Rejected	9
Approve a Task	10
Reject a Task	10
Start a Proposal Request – Negotiations (PRN) or Field Work Directive (FWD)	11
If a Field Work Directive is Issued	16
Checking on the Status of a Task Orders or Contract Change Request	17
Creating a Request for Information (RFI)	18
RFI Response	19
Creating a Submittal.....	20
Submittal Response	20

Payment Request

1. After logging into the system, if you do not see your project or On-Call Contract on the tabs
2. Click on the + sign and input either the project number (23-#### or 40-#### or PW-#### or other) or the On-Call Contract's contract number (46000####) or the project name or On-Call Contracts name

Task Distribution

Name	Number	Location
V - SAFD Exhaust Ventilation Project	2015070001	/CoSA/CIMS/Buildings/Public Safety
H - Hausman-UTSA Connector	23-01767	/CoSA/CIMS/Streets and Drainage
H - Hausman Road Improvements	40-00256	/CoSA/CIMS/Streets and Drainage
H - Hausman Rd Public Art Project	40-00323A	/CoSA/CIMS/Public Art
H - Hausman Road (Loop 1604 to IH 10)	40-00420	/CoSA/CIMS/Streets and Drainage

Task Distribution

H - Roosevelt Drainage at March Ave...

3. Find and click on your either your “On-Call Contract” or “Project”.
4. Click on “Logs” then on “Payment Request”

Payment Request

Date	Vendor Name	PO Title	PO #	L...	Est No	Agency	Total Invoiced	Special Contract	Phase	Status
02/05/2020	R L JONES COMPANY...	Const - CPS Gas	4500367873	4	5	CPS Gas	\$62.00	No	Construction	Reject
02/05/2020	R L JONES COMPANY...	Const - City Work	4500367873	1	9	City	\$100.00	No	Construction	Comp
02/05/2020	R L JONES COMPANY...	Const - City Work	4500367873	1	10	City	\$840.00	No	Construction	Termi
08/05/2014	POZNECKI-CAMARILL...	Design - City Work	4500334681	1	20	City	\$2,698.50	No	Design	Comp
05/19/2014	R L JONES COMPANY...	Const - City Work	4500367873	1	8	City	\$0.00	No	Construction	Comp
05/08/2014	R L JONES COMPANY...	Const - City Work	4500367873	1	7	City	\$18,223.16	No	Construction	Comp
03/08/2014	POZNECKI-CAMARILL...	Design - City Work	4500334681	1	19	City	\$3,698.50	No	Design	Comp
02/05/2014	R L JONES COMPANY...	Const - City Work	4500367873	1	6	City	\$114,527.00	No	Construction	Comp
02/04/2014	POZNECKI-CAMARILL...	Design - City Work	4500334681	1	18	City	\$3,698.50	No	Design	Comp
01/09/2014	R L JONES COMPANY...	Const - SAWS Sewer (...)	4500367873	2	4	SAWS Sewer	\$13,871.50	No	Construction	Comp
01/07/2014	POZNECKI-CAMARILL...	Design - City Work	4500334681	1	17	City	\$3,698.50	No	Design	Comp
12/05/2013	R L JONES COMPANY...	Const - City Work	4500367873	1	5	City	\$84,208.50	No	Construction	Comp
12/05/2013	R L JONES COMPANY...	Const - SAWS Sewer (...)	4500367873	2	3	SAWS Sewer	\$13,871.50	No	Construction	Termi
12/05/2013	R L JONES COMPANY...	Const - SAWS Water (0...	4500367873	3	3	SAWS Water	\$5,380.00	No	Construction	Comp
12/05/2013	POZNECKI-CAMARILL...	Design - City Work	4500334681	1	16	City	\$3,698.50	No	Design	Comp
11/11/2013	R L JONES COMPANY...	Const - CPS Gas	4500367873	4	4	CPS Gas	\$2,500.00	No	Construction	Comp
11/05/2013	R L JONES COMPANY...	Const - City Work	4500367873	1	4	City	\$225,751.35	No	Construction	Comp
11/05/2013	POZNECKI-CAMARILL...	Design - City Work	4500334681	1	15	City	\$3,698.50	No	Design	Comp
10/16/2013	R L JONES COMPANY...	Const - CPS Gas	4500367873	4	3	CPS Gas	\$7,978.50	No	Construction	Comp

Total: 42

a) On the upper left of the screen, under Payment Request, click on **“Create”** (a pop screen will appear) on the top section of the form (**Creation-Revise**) you must fill out the four (4) items that have red asterisks.

- Under the **Reference Commit**- click on the **“Select”** button then find and click on the **“PO Line”** you want to invoice – (City, SAWS Sewer, SAWS Water, CPS)
- “YOU CAN ONLY SELECT ONE OF THESE ITEMS”**
- “DO NOT SELECT ANY BAD or CLOSED ITEM”**
Click on **“Select”** in the bottom right

Create New Payment Request

Project ID: 40-00245 Project Name: Roosevelt Drainage at March Avenue

Invoice Summary

Reference Commit * Period To *

Check Stub Info * Final Estimate? *

Date: 02/06/2020 Application No: 1

MSOS Total Amount: \$0.00 Total Invoiced Amount: \$0.00

Retainage %: Estimated Payment: \$0.00

PO Line

Record Number	PO Line Status	SAP Contract No.	Vendor Name	PO #	L...	PO Title	Agency	Special Contract	Phase	Initial Amount	Type Contract	Requested By	Type Contr
PL-0000006	Open	4600013025	R L JONES COM...	4500367873	4	Const - CPS Gas	CPS Gas	No	Construction	66,408.50	Construction		
PL-0000005	Open	4600013025	R L JONES COM...	4500367873	3	Const - SAWS Water (D...	SAWS W...	No	Construction	152,482.50	Construction		
PL-0000004	Open	4600013025	R L JONES COM...	4500367873	2	Const - SAWS Sewer (...)	SAWS S...	No	Construction	46,380.90	Construction		
PL-0000003	Open	4600013025	R L JONES COM...	4500367873	1	Const - City Work	City	No	Construction	958,182.00	Construction		
PL-0000002	Open	4600012159	POZNECKI-CAM...	4500334681	0	Design - Allowances - ...	City		Design	12,968.00	Engineering		
PL-0000001	Open	4600012159	POZNECKI-CAM...	4500334681	1	Design - City Work	City		Design	259,959.95	Engineering		

Total: 6

b) **“Period To:”** Click on the Calendar Icon and select the date you want. or input the mm/dd/yyyy (ie 02/08/2020) Click on **“OK”** when you have selected the date. (It must be at least one day after the previous payment request for this PO Line.)

c) **“Final Estimate”** Click on Select and select **“No”**, Click **“Yes”** if it is your FINAL PAYMENT

d) **“Check Stub Info:”** This item will be imprinted on your check stub or printout that you receive from the City of San Antonio Finance Department. Use your company’s internal Invoice number or project name/number for reference purposes.

5. Click on the “Invoice Request” Tab

- At the top, click on “Add” (Another page will open!!)
- If you see this box, STOP you cannot do a payment request until the previous request has completed!!!!

- Using the scroll bar on the bottom, scroll to the right until you see “This Invoice Quantity” and enter your quantities

- If you have Materials Stored on Site (MSOS) scroll the bottom bar further right until you see MSOS Current Amount and enter the dollar amount of your MSOS.
- You may have more than one page of line items**, just click on the >> at the top to get to the next page or click on the “Display” to increase the lines per page.
- Once you have complete enter your items, click on “Save” in the upper left.

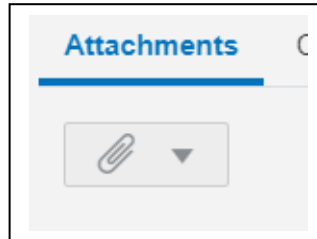
DO NOT CLICK ON THE UPPER RIGHT “Save”, THAT WILL ONLY SAVE YOUR DRAFT.

6. **Please Note:** If you need to Attach something to the Payment Request please do the following:
!!! YOU ONLY NEED TO DO THIS IF YOU HAVE SOMETHING TO ATTACH !!!!
!!! IF YOU DO NOT NEED TO ATTACH SOMETHING GO TO STEP 10 BELOW!!!

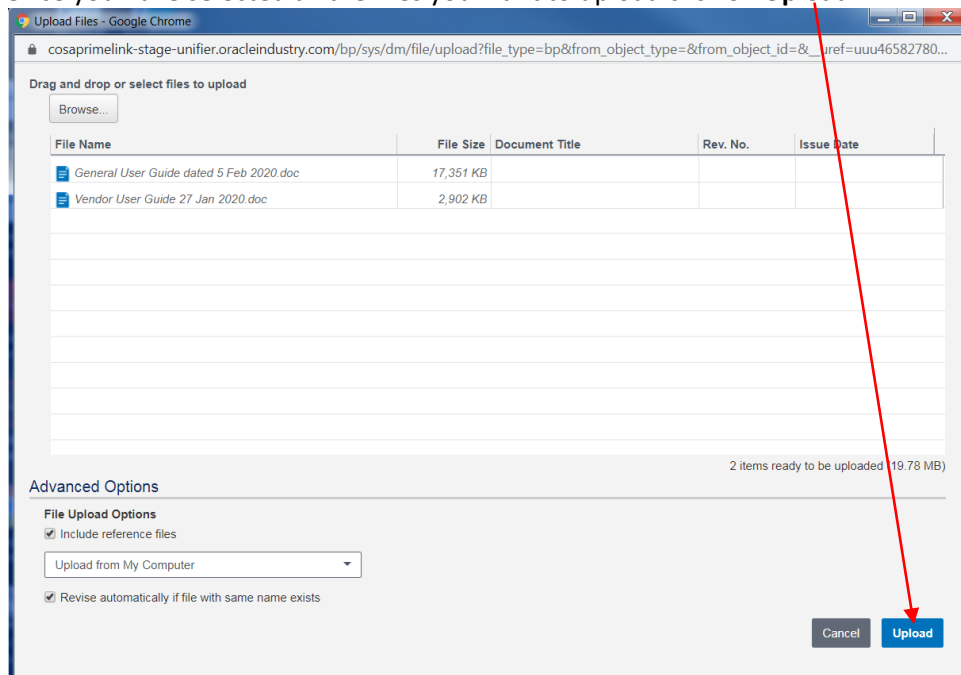
7. To add an attachment

Click on **Creation-Revise**, then **Edit**,

then click on the “Paperclip under **Attachment**”, then on “**Browse...**”

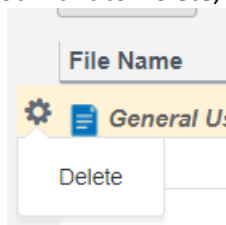


- a) In the window that opens, click on **Browse...**
- b) Find and select the File or (Holding the Alt Key many File can be uploaded)
– Click on Upload
- c) If you have other files to upload, click on Browse and do b) again
- d) Once you have selected all the files you want to upload click on **Upload**



8. Remove attachment

- a) Click on Attachments
- b) Select item you would like to delete
- c) Click on Gear to the left of the item you want to Delete, then on Delete



9. If you want to make a Comment, click on **“Comments”** on the Right
- a. Input your comments, you can also add another attachment here, and then click on **“Post”**.

The screenshot shows the 'Create New Payment Request' form in a web browser. The form has two main sections: 'General' and 'Invoice Summary'. The 'General' section contains 'Project ID' (40-00245) and 'Project Name' (Roosevelt Drainage at March Avenue). The 'Invoice Summary' section contains 'Reference Commit' (4500367873-1) and 'Period To' (02/08/2020). On the right side, there is a 'Comments' tab selected, showing a text input field with 'Test Comments' and a 'Post' button. A red arrow points from the 'Comments' tab to the 'Post' button.

10. At the upper right and click on **Send**

The screenshot shows the same 'Create New Payment Request' form. The 'Comments' tab is still selected. A red arrow points from the 'Send' button in the top right corner of the form to the 'Send' button in the 'Workflow Action Details' screen shown in the next screenshot.

- a. After you click “Send”, the Workflow Actions Details screen will show up, click on **“Send”**
- b. You will received the Notification screen, click **“OK”**

The screenshot shows the 'Workflow Action Details' screen. It has two sections: 'Action Details' and 'Due Date Details'. The 'Action Details' section shows 'Workflow Actions' (Submit for Invoice Creation) and 'Send For' (Processed). The 'Due Date Details' section shows 'Task Due Date' (02/10/2020 09:07 AM). There are 'Cancel' and 'Send' buttons at the bottom. A red arrow points from the 'Send' button to the 'Send' button in the 'Notification' screen shown in the next screenshot.

The screenshot shows the 'Notification' screen. It has a green checkmark icon and the text 'PR-0000043 has been created successfully.' There is an 'OK' button at the bottom right.

11. Once you have submitted your Payment Request.
 - a. Some vendors have a different person approve their Payment Request other vendors the same person that submit the payment request will approve it.
 - b. If you receive an email notification requiring your action, click on the link.
 - c. To approve your invoice – Double-click on your payment request that you just built.
 - d. Click on “Accept Task”

- e. Check that all the amounts (click on Invoice Request) are correct.
- f. **NOTE:** Under “Payment Request” tab, click on Invoice Details and check that “Invoice #:” has something in it.


(If there is not an “INV-0000000” number, do not approve it)

You must wait until there is a number! (Takes about 2 to 5 minutes)

12. If there is an Invoice number, go up to the upper right and click on **Send**.
 - a. After you click “Send”, the Workflow Actions Details screen will show up,
 - You can use the CC: to copy others who need to see the Payment Request
 - b. Click on “**Send**”, your payment request has been submitted for approval.

Checking on the Status of a Payment Request

1. Open your Project or On-Call Contract
2. Select “Logs”,
 - Click on “Payment Request”
3. Under Payment Request – double-click and open the Payment Request you are looking for.

4. On the right side, click on the right arrow to move everything to the left until you see Workflow Progress
 - Click on the  to increase this part

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	JAMES BENNETT	City of San Antonio	Completed	Submit	02/05/2020 10:17 AM (UTC-6)
Contractor Approval	JAMES BENNETT	City of San Antonio	Closed	Send for Revision	02/05/2020 10:18 AM (UTC-6)
Contractor Revision	JAMES BENNETT	City of San Antonio	Closed	Submit	02/05/2020 10:19 AM (UTC-6)
Contractor Approval	JAMES BENNETT	City of San Antonio	Closed	Send for Revision	02/05/2020 11:28 AM (UTC-6)
Contractor Revision	JAMES BENNETT	City of San Antonio	Closed	Submit	02/05/2020 02:21 PM (UTC-6)
Contractor Approval	JAMES BENNETT	City of San Antonio	Closed	Submit	02/05/2020 03:16 PM (UTC-6)
CPS Gas Const A...	JAMES BENNETT	City of San Antonio	Closed	Reject	02/06/2020 09:17 AM (UTC-6)
Contractor Revision	JAMES BENNETT	City of San Antonio	Completed	Submit	02/07/2020 10:21 AM (UTC-6)
Contractor Approval	JAMES BENNETT	City of San Antonio	Completed	Submit	02/07/2020 10:24 AM (UTC-6)
CPS Gas Const A...	JAMES BENNETT	City of San Antonio	Not Started		

5. You will see the workflow process and who the item is waiting on.
 - If you click on view Graphic you will see the workflow

Note: If you click on “Audit Log” you can see who has approved or declined the item

Schedule of Values – As of Last Completed Pay Request

There is a report that will show all schedule of value line items for a project as of the last completed Payment Request. The report allows the user to select a specific type contract (construction, engineering, architecture, etc.) and the agency (City, SAWS Water, SAWS Sewer, etc.) to be included in the report. **If a payment request has not completed the workflow, amounts for that payment request will not be in the Schedule of Values.** You must go to the Payment Request to see those values.

Limitations of the report

- Following fields are not available: Specification Number (100.1, 100.2, etc.) and Unit of Measure (SF, SY, etc.)
- The Unit Prices and Contract Quantities will reflect 0 until the item is partially or completed billed by the Vendor. The schedule of values (dollar amount) is shown.
- The report only shows information in the current project. **It will not show information in other projects when the contract is used on multiple projects.**

How to access the report:

1. **Go to your project!!!!**
2. Go to the bottom of the menu on the left side of your screen and select “Reports”
3. Select “User-Defined”
4. In the middle of your screen you should see a list of reports. Double click on the **“Schedule of Values – As of Last Completed Pay Request”** report to open it.
 - You may use the filters in the center to control the output. **You do not have to!!**
 - The output runs best in pdf or csv (for excel) formats.
 - If you get nothing on the report and **you used filters!**
 - Remove all the filters and try it.

The screenshot shows a web-based configuration window titled "Schedule of Values - As of Last Completed Pay Request". The window is divided into several sections:

- Query and Format:** Includes a "Report Format" section with radio buttons for HTML (selected), CSV, Excel, PDF, and XML. Below it is a "Record count for UDR" dropdown menu set to "Select".
- Time Zone:** A dropdown menu showing "(UTC-06:00) Central Time (US & Canada)".
- Report Query Parameters:** A section with five filter rows, each with a label, an operator, and a value field:
 - Vendor Name: contains []
 - Agency: equals Select
 - Type Contract: equals Select
 - PO No-Line: contains []
 - PO Line Status: does not equal Bad
- Report Location:** A text input field.
- Workspaces:** A text input field.
- Notes:** A text input field.

At the bottom right of the window are two buttons: "Cancel" and "Run Report".

If Payment Request is Rejected

1. Either under the “HOME” – click on “Tasks” or under your project – click on “Task”
2. Or on the lists of items, double-click on the payment request that was “Rejected”.

Payment Request

ID	Date	Vendor Name	PO Title	PO #	L	Est No	Agency	Total Invoiced	Special Contract	Phase	Status
02/07/2020	02/07/2020	R L JONES COMPANY...	Const - CPS Gas	4500367873	4	5	CPS Gas	\$62.00	No	Construction	Rejected
02/05/2020	02/05/2020	R L JONES COMPANY...	Const - City Work	4500367873	1	10	City	\$0.00	No	Construction	Terminated
02/05/2020	02/05/2020	R L JONES COMPANY...	Const - City Work	4500367873	1	9	City	\$100.00	No	Construction	Completed
08/05/2014	08/05/2014	POZNECKO-CAMARILL	Design - City Work	4500334681	1	20	City	\$2,760.00	No	Design	Completed
05/19/2014	05/19/2014	R L JONES COMPANY...	Const - City Work	4500367873	1	8	City	\$0.00	No	Construction	Completed
05/08/2014	05/08/2014	R L JONES COMPANY...	Const - City Work	4500367873	1	7	City	\$19,223.16	No	Construction	Completed
03/06/2014	03/06/2014	POZNECKO-CAMARILL	Design - City Work	4500334681	1	19	City	\$3,696.50	No	Design	Completed
02/05/2014	02/05/2014	R L JONES COMPANY...	Const - City Work	4500367873	1	6	City	\$114,527.00	No	Construction	Completed
02/04/2014	02/04/2014	POZNECKO-CAMARILL	Design - City Work	4500334681	1	18	City	\$3,696.50	No	Design	Completed
01/09/2014	01/09/2014	R L JONES COMPANY...	Const - SAWS Sewer (	4500367873	2	4	SAWS Sewer	\$13,871.50	No	Construction	Completed
01/07/2014	01/07/2014	POZNECKO-CAMARILL	Design - City Work	4500334681	1	17	City	\$3,696.50	No	Design	Completed
12/05/2013	12/05/2013	R L JONES COMPANY...	Const - SAWS Sewer (	4500367873	2	3	SAWS Sewer	\$13,871.50	No	Construction	Terminated
12/05/2013	12/05/2013	POZNECKO-CAMARILL	Design - City Work	4500334681	1	16	City	\$3,696.50	No	Design	Completed
12/05/2013	12/05/2013	R L JONES COMPANY...	Const - City Work	4500367873	1	5	City	\$84,208.50	No	Construction	Completed
12/05/2013	12/05/2013	R L JONES COMPANY...	Const - SAWS Water (	4500367873	3	3	SAWS Water	\$5,380.00	No	Construction	Completed
11/19/2013	11/19/2013	R L JONES COMPANY...	Const - CPS Gas	4500367873	4	4	CPS Gas	\$2,500.00	No	Construction	Completed
11/05/2013	11/05/2013	POZNECKO-CAMARILL	Design - City Work	4500334681	1	15	City	\$3,696.50	No	Design	Completed
11/05/2013	11/05/2013	R L JONES COMPANY...	Const - City Work	4500367873	1	4	City	\$225,751.36	No	Construction	Completed
10/16/2013	10/16/2013	R L JONES COMPANY...	Const - CPS Gas	4500367873	4	3	CPS Gas	\$2,378.50	No	Construction	Completed

3. Click on “Accept”,
 - a. If you need to change an amount, find the item you need to change on the “Invoice Request” tab
 - b. To change a line amount, click on that line and correct the “This Invoice Quantity”.

Then do Items 9 thru 13 on page 5-8 to resubmit and approve it again.

Payment Request - Const - CPS Gas - Project No. 40-00245 - Google Chrome

Payment Request

Creation-Revise **Invoice Request**

Add [Icons]

Ref.	Item Number	Specification	Total Contract Quantity	Previous Application Quantity	This Invoice Quantity	Total Application Quantity	Invoice Amount	MSOS Previous Amount
001	4		16	0	1	1	\$62.00	\$0.00
002	1		4	3	0	0	-\$5,625.00	\$0.00
003	3		98	45	66	111	\$4,290.00	\$0.00
004	3		1,371	1,371	3	1,374	\$97.00	\$0.00
TOTAL			1,489	1,419	67	1,486	-\$1,186.00	\$0.00

Total: 4

4. **NOTE:** If everything on the “Payment Request Line Item” is grayed out. Click on the “Workflow Actions” dropdown box in the upper left of the main screen and see if it states “Creator Revision” or “Revise”. If it states one of those, you must click on it then click on “Send”.
Then go back to step 1 above.

Approve a Task

1. Under **Items Requiring Your Attention** on the Home tab – Select **Tasks**
2. Double-click on a task on your list and review the item
3. In the Upper Right hand corner - click on “**Accept**” or “**Decline**”

(If you Decline a task – you will receive a dialog box stating: Your name will be removed from this step for this record. Are you sure you want to Decline Task? Click Yes or No)

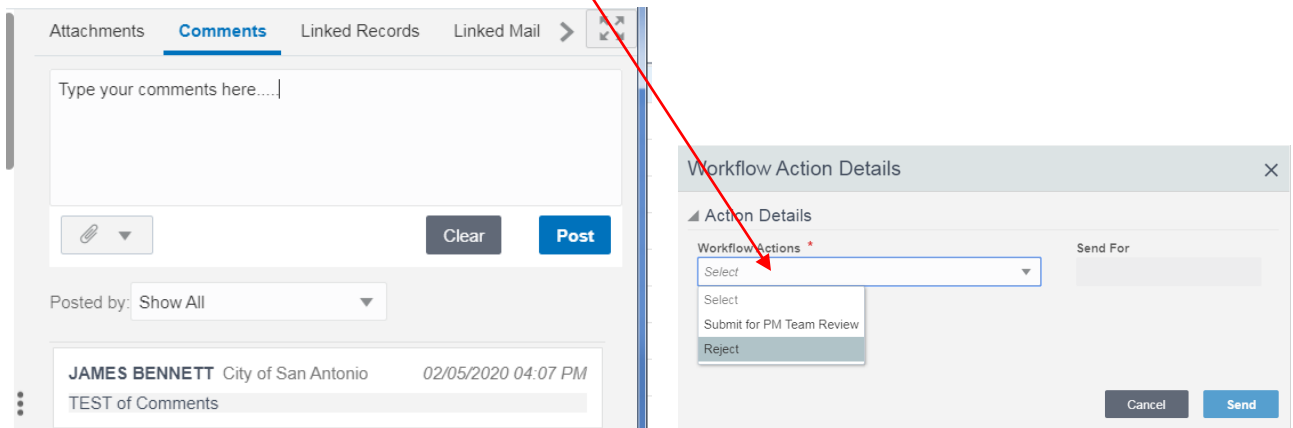
(Declining a task does not REJECT it, it only means someone else will take care of it.)

If you are the only person on the approval, you must either “Approve” or “Reject” the item.

4. After you review the file and you want to accepted it (You have reviewed the file)
 - Click on “**Send**”
 - Click on Workflow Actions dropdown menu and select one of the items
 - In the lower right corner, click on “**Send**”

Reject a Task

1. Open the task
2. Click on “**Accept Task**” (***DO NOT DECLINE IT***)
3. On the right side of the screen, click on “**Comments**”
4. Type in the reason you are rejecting the item.
5. You can add an Attachment here now,
6. Click on “**Post**”
7. Click on “**Send**”
8. Under “Workflow Actions”, select “**Reject**”
9. Click on “**Send**”



Start a Proposal Request – Negotiations (PRN) or Field Work Directive (FWD)

Purpose: The Proposal Request and Negotiations (PRN) or Field Work Directive (FWD) are used by the City to request proposals from vendors and for vendors to submit their proposals to the City. **(Change Orders and some Task Order will start at this level)**

Start a Proposal Request – Negotiations

1. **Open your Project**
2. Select "Logs, then click on "Proposal Request –Negotiations", then click on **"Create"**

- a. At the end of the **"Purchase Order Record No"**. Click on **"Select"**

(Anything with a red * must be filled out)

Create New Proposal Request - Negotiations

Select one of the Vendor's Purchase Order Lines. This will upload the Contract and Vendor's information.

Purchase Order Record No. *

Type a Record Number...

General

Project Number: 40-00350
Project Name: V - District 10 Senior Center
Record Number:
Status:
Title *:
SAP Contract No.:
Creator: JAMES BENNETT
Creation Date:
Type Contract *:
Vendor Name:
Agency *:
Submit To *:
On-Call Contract?:
Special Contract:
Contract Amount:
Previous Contract Changes:
Linked Records:
Linked Mail:
Add:
Information:
No Linked Records.

PO Line

Search | Find on Page

Status	Record No.	Vendor Name	Project Number	Project Name	Phase	Type PO	PO Line Sta...	SOV Log	PO Title
Closed	PL-0000008	GUIDO BROTHE...	40-00350	V - District 10 Senior C.	Construction		Open		CCR-05 Part 2 District
Closed	PL-0000007	PHI SERVICE AG...	40-00350	V - District 10 Senior C.	Testing and B...		Open		D10 Senior Center Test...
Closed	PL-0000006	GUIDO BROTHE...	40-00350	V - District 10 Senior C.	Construction		Open		Const - Contingency (D...
Closed	PL-0000005	GUIDO BROTHE...	40-00350	V - District 10 Senior C.	Construction		Open		Const - City Work
Closed	PL-0000004	GUIDO BROTHE...	40-00350	V - District 10 Senior C.	Construction		Open		Pre-Const - City Work
Closed	PL-0000002	REHMER VAUGH...	40-00350	V - District 10 Senior C.	Design		Open		Design - Addl Svcs & Al...
Closed	PL-0000001	REHMER VAUGH...	40-00350	V - District 10 Senior C.	Design		Open		Design - City Base Fee

Total: 7

Cancel Select

2. Highlight the one you want to use and click on **"Select"**
This will upload the Vendor and contract information.

3. **Title:** Input a meaning full title. (What you want to do!!)

4. **Type of Contract:** Click on the **type of Contract**

Type Contract *

Select

- Engineering
- Architectural
- Construction
- Professional Services
- Lease

5. **Agency:** Select the proper agency – City, SAWS Water or Sewer, etc

Agency *

Select

- City
- SAWS Sewer
- SAWS Water
- SAWS Recycle Water
- SAWS Chilled Water
- SAWS BexarMet
- CPS Gas
- CPS Electric

Contract Change Request

6. **On-Call Contract?:** If **On-Call Contract** – Select “Yes” – If not Select “No”.

On-Call Contract?

No

Select

Yes

No

7. **Submit To:** Select who you wish to send it to first. The system will send it to the appropriate person based on the “**Agency**” and “**Submit To**” entries.

Submit To *

Select

- Project Team
- Consultant
- Contractor
- Joint Bidder Agency

8. **Change to Contract:** Not required for initial submittal however if the Vendor is submitting a proposal it should be filled out. It is a required field for the Vendor for all future steps.
9. **Change to Calendar Days:** Used for construction. Not required for initial submittal however if the Contractor is submitting a proposal it should be filled out. It is a required field for the Contractor for all future steps. Zero days are a valid entry.

Create New Proposal Request - Negotiations

Send Save

Proposal Request - Negotiations Comments

Contract Amount	Previous Contract Changes
6,913,230.00	1,177,117.10
Contract #	Contract Change Percentage
4600013288	17.03
Change to Contract Cost	Change to Calendar Days
0.00	0
Contract Change Request	Field Work Directive Item

Linked Records Linked Mail

Add

Description of Change

Description of Change *

Justification for Proposed Change

Ordinance Information

Change Order Council Threshold


100,000.00

Information

No Linked Records.

10. **Description of Change.** Explain what is being requested.
11. **Justification for Proposed Change.** Explain why the requested action is required. This is not required but may be useful when the Contract Change Request is created.
12. Click on the **Comment** tab to place any additional comments in the Comments Tab.
13. Click on Linked Records to add Attachments
14. Click on Linked Emails to add Emails

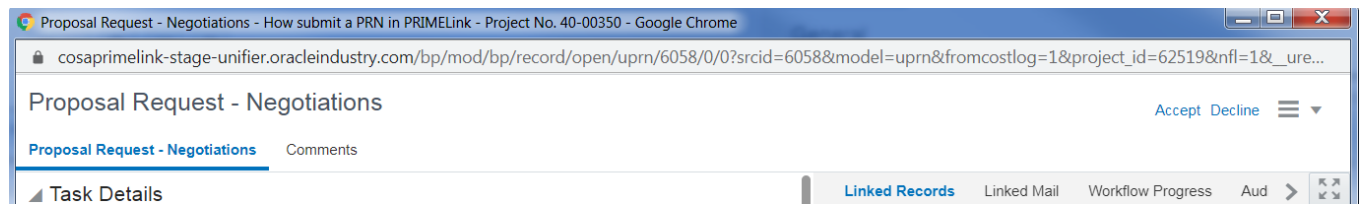
15. Click on “**Send**” in the upper right corner.
 - a. Upon clicking - the following will show up.

- **CC: Copy Furnish.** The program is setup to copy furnish select people when the PRN is submitted. You may add additional personnel by selecting the CC  button at the end.
- **Task Due Date.**

16. Other Special Functions

- **Changing Cost and Days.** On all workflow steps after creation only the Vendor can change the cost and day fields.
- **Cancel PRN.** Only the Project Team can cancel a PRN.
- **Other Reviewers Step.** Allows the Project Team to send the PRN to anyone on the project for review. The Other Reviewer can only send the PRN back to the person that sent it to them.
- **Attachments.** All attachments and many of the fields will be copied over to the Contract Change Request and Field Work Directive when they are auto-created. The Project Team has the option to remove attachments from the Contract Change Request or Field Work Directive when they finalize them.
- **Viewing Previous Comments.** You will not be able to see previous comments once you accept the task. Select the hyper link in the Action Details to see the previous comments.

17. Ok the PRN has been send to you and others.
 - a. To do anything on the PRN, you need to **Accept** it. (Upper Right Corner)
 - b. If you will not be working on it, please click on **Decline**.



18. The **Contract Change Request** or **Field Work Directive (FWD)** can only be started by the PM Team.

- If needed you can cancel the PRN from Here.
- The PRN can be send to the Consultant, Contractor or Other Reviewers from here.
- If you select **Project Team Accept** – The Contract Change Order process will start
- If you select **Initiate Field Work Directive** – The Field Work Directive will start

See Page 15

- If you select **To Consultant Review**, or **To Contractor Review** – the PRN will be send to whoever is assigned to the project as the Consultant or Contractor. You can also CC it to others

If you select To Others Review – you will need to select who should review it.

See Figure 2

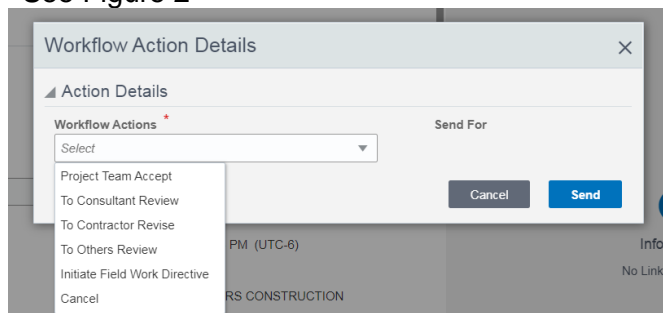




Figure 1

For To Others Review –



Click on the  at the end of the line and select who you want to review the PRN. Then click on Select

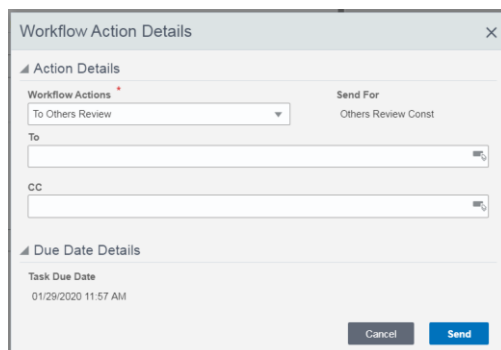
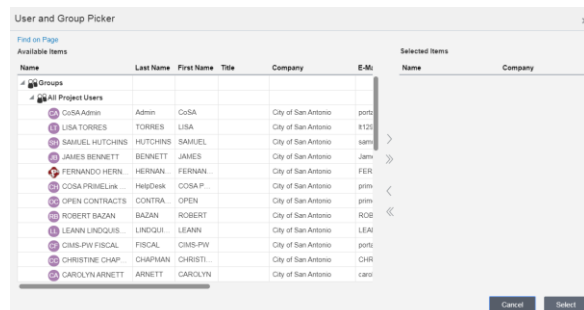


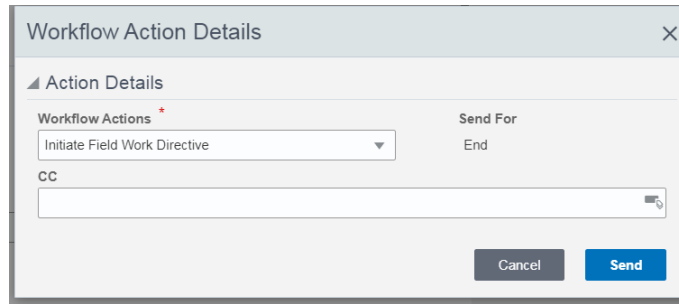
Figure 2



19. Responses to PRNs will be done using the **Approve or Reject a Task**. See Page 6

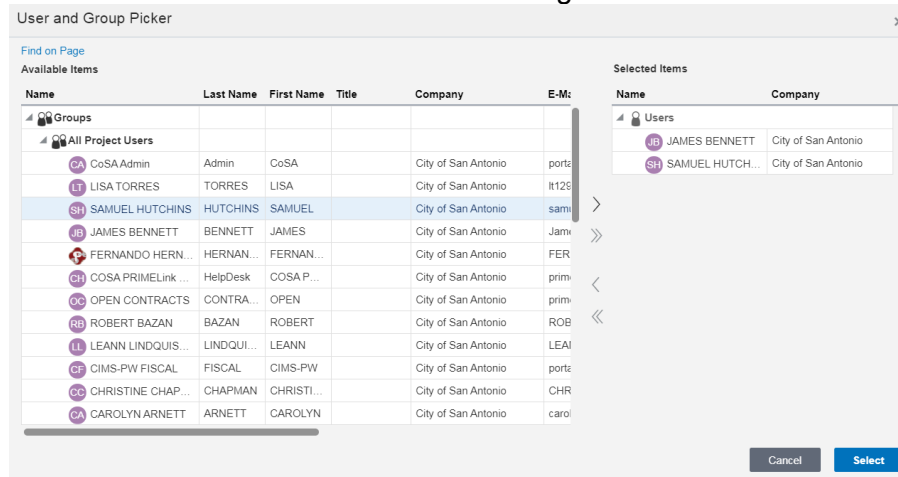
If a Field Work Directive has been Issued

1. During the PRN a Field Work Directive needs to be started
 - a. During the PRN, you are at the “Send” process, select Initiate Field Word Directive
 - b. Click on CC to send the FWD to the contractor for their input



Click on the **Select** button at the end and add the needed personnel by highlighting them then clicking on the > button on the right

Then click on the “Select” button on the lower right. Then click on Send



Name	Last Name	First Name	Title	Company	E-Mail
Groups					
All Project Users					
CoSA Admin	Admin	CoSA		City of San Antonio	portz
LISA TORRES	TORRES	LISA		City of San Antonio	lt123
SAMUEL HUTCHINS	HUTCHINS	SAMUEL		City of San Antonio	sami
JAMES BENNETT	BENNETT	JAMES		City of San Antonio	Jam
FERNANDO HERNANDEZ	HERNANDEZ	FERNANDO		City of San Antonio	FER
COSA PRIMELINK	HelpDesk	COSA P...		City of San Antonio	prim
OPEN CONTRACTS	CONTRACTS	OPEN		City of San Antonio	prim
ROBERT BAZAN	BAZAN	ROBERT		City of San Antonio	ROB
LEANN LINDQUIST	LINDQUIST	LEANN		City of San Antonio	LEA
CIMS-PW FISCAL	FISCAL	CIMS-PW		City of San Antonio	portz
CHRISTINE CHAPMAN	CHAPMAN	CHRISTINE		City of San Antonio	CHR
CAROLYN ARNETT	ARNETT	CAROLYN		City of San Antonio	caro

Name	Company
JAMES BENNETT	City of San Antonio
SAMUEL HUTCHINS	City of San Antonio


1. If the FWD is **issued** – a **Unifier Task email** will be sent to the contractor for the contractor to acknowledge that it has received the FWD. The contractor needs to understand that the “**Contractor Acknowledgement**” step does not constitute agreement with the FWD nor does failure to process the document in PRIMELink relieve the Contractor from the responsibility to comply with the FWD. The Contractor’s failure to process the document in PRIMELink will prevent the FWD from being added to the Payment Request and the Contractor will not be able to submit any invoices for this work.

2. Once the Contractor approves the FWD, a Unifier Task email will be sent to the PRIMELink Helpdesk and they will add the FWD to the payment request.

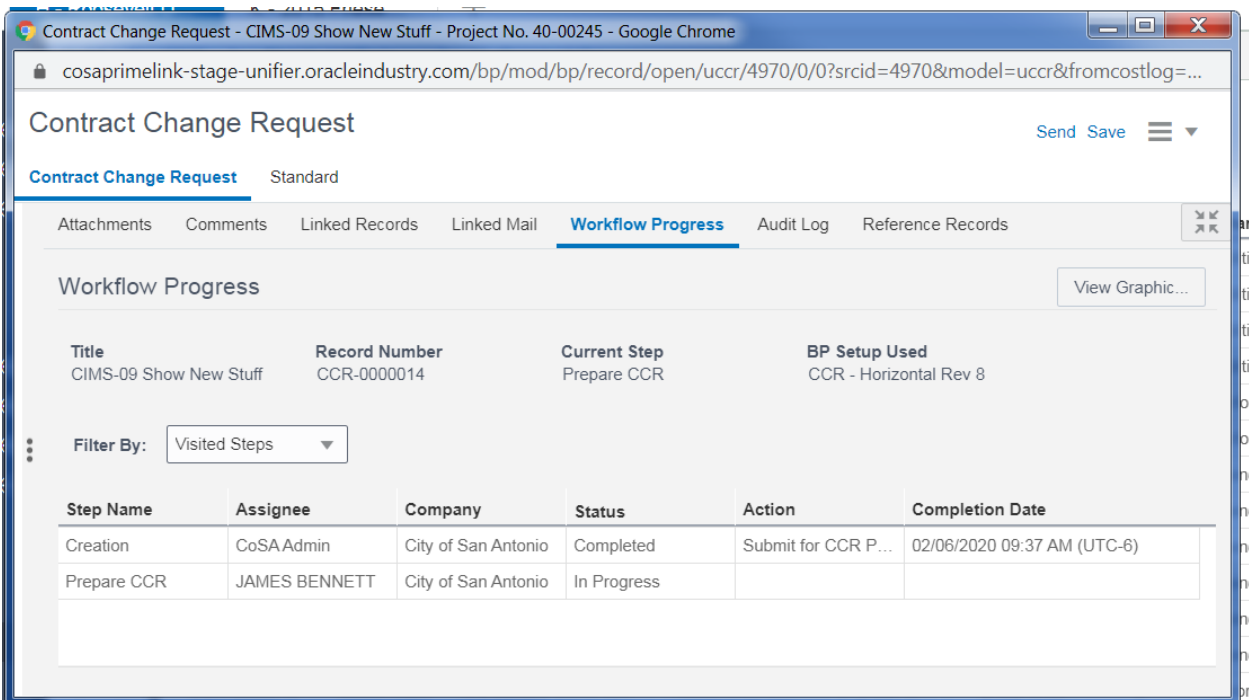
(Field Work Directive (FWD) in accordance with the construction contract allows the City, when unable to reach an agreement with the Contractor, to unilaterally direct the Contractor to do the work for a Not-to-Exceed amount. The Contractor must track time and materials to justify invoicing for this work.)

Checking on the Status of a Task Orders or Contract Change Request

NOTE: Contract change request replace amendments, change orders and task orders within the projects. Task orders are still used for On-Call Contracts.

1. Open your Project or On-Call Contract
2. Select “Logs”,
 - On-Call Contracts - click on “Task Order”
 - Projects – click on “Contract Change Request”
3. On the right side – select the Task Order or Change Request you are inquiring
4. On the right side, click on the right arrow to move everything to the left until you see Workflow Progress
 - Click on the  to increase this part
5. You will see the workflow process and who the item is waiting on.
 - If you click on view Graphic you will see the workflow

Note: If you click on the Menu Bar’s “View” and then “Audit Log” you can see who has approved or rejected the item.



The screenshot shows a web browser window titled "Contract Change Request - CIMS-09 Show New Stuff - Project No. 40-00245 - Google Chrome". The URL is "cosaprimelink-stage-unifier.oracleindustry.com/bp/mod/bp/record/open/uccr/4970/0/0?srcid=4970&model=uccr&fromcostlog=...". The page title is "Contract Change Request". There are "Send" and "Save" buttons and a menu icon. Below the title, there are tabs: "Contract Change Request" (selected), "Standard", "Attachments", "Comments", "Linked Records", "Linked Mail", "Workflow Progress" (selected), "Audit Log", and "Reference Records". The "Workflow Progress" section shows a "View Graphic..." button. Below this, there is a summary table with the following data:

Title	Record Number	Current Step	BP Setup Used
CIMS-09 Show New Stuff	CCR-0000014	Prepare CCR	CCR - Horizontal Rev 8

Below the summary table, there is a "Filter By:" dropdown menu set to "Visited Steps". Below the filter, there is a table with the following data:

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	CoSAAdmin	City of San Antonio	Completed	Submit for CCR P...	02/06/2020 09:37 AM (UTC-6)
Prepare CCR	JAMES BENNETT	City of San Antonio	In Progress		

Creating a Request for Information (RFI)

1. Click **“Collaboration BPs”**
2. Click on **“RFIs”**
3. Complete the **“Shell Information”**
4. Complete the **“Action Request”**
5. Complete the **“Cost and Schedule Information”**
6. To add Attachments, click on **Linked Records** or **Linked Mail** and add if needed
7. Click on Send (in the upper right)
 - a. See Figure 2
8. Select a **Workflow Actions**
9. Then to select who to CC

Figure 1


10. Click on the  at the end of the line and select who you want to review the RFI
11. Click on **“Select”**
12. Click Send
13. Notification of RFI sent

Figure 2

Name	Company Name	Task Due Date
JAMES BENNETT	City of San Antonio	01/30/2020 02:19 PM
Project Managers		01/30/2020 02:19 PM

Figure 3

RFI Response

You will receive an email that an RFI requires your review and it will contain a link

1. Click on the Task that will open up the RFI
2. Click on Accept Task
3. Open the Upper Form (RFI)
4. Select collaboration to provide your comments
5. Scroll to the bottom and Type in your Approved Response
 - Only if you are the consultant or PM team and you are providing the final response.
6. Select a Workflow Action
7. Click on Send

Creating a Submittal

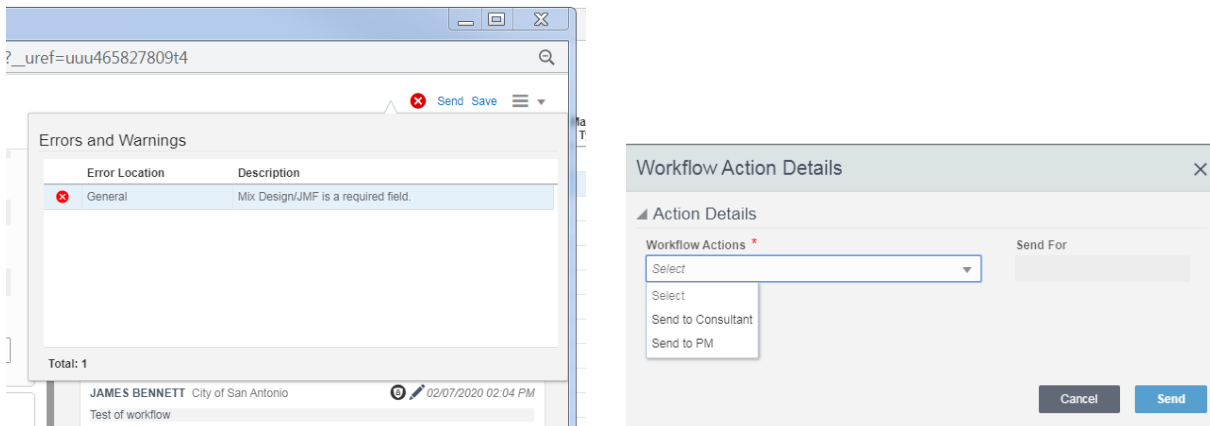
1. Open your project and click on “Logs
2. Click on “Submittals”
3. Click on “Create”

The screenshot shows the 'Create New Submittal' form. The 'General' tab is active. The 'Applicable Location' section has a text input field. The 'Title' field is marked with a red asterisk. The 'Agency' field has a dropdown menu. The 'Due Date' field has a date picker. The 'Reference ID' field has a text input. The 'Drawing No.' field has a text input. The 'Creator' field is populated with 'JAMES BENNETT'. The 'Record Number' field is empty. The 'Status' field is empty. The 'Creation Date' field has a date picker. The 'Specification Section' field has a text input. The 'Mix Design/JMF Information' section has a dropdown for 'Mix Design/JMF', a text input for 'Material Type', a dropdown for 'Class Type', and a text input for 'Mix/JMF Number/Name'. The 'Description' field has a text input with a character count 'Enter 4000 or fewer characters'. The 'Comments' panel on the right shows 'No Comments are available'.

4. On the General Tab, complete the Applicable Location section
(Anything with a red * must be filled out)
5. Complete the Mix Design/JMF Information section
6. Fill out the Description section
7. Click on the Line Items Tab,
 - a. if you need to add any Line Items, click on “Add”
 - b. Do not forget to select the Line Item Status item
 - c. Fill in the items on the right, click on “Save & Add New” if need or click on “Save”

The screenshot shows the 'Submittals' form with the 'Line Item Details' tab active. The 'Name' field has a text input. The 'Variation From Contract' field has a dropdown menu. The 'Line Item Status' field has a dropdown menu with a list of options: Submitted, Approved, Rejected, and Resubmitted. The 'Sent Via' field has a dropdown menu. The 'Doc Type' field has a dropdown menu. The 'Variation From Contract Documents' section has a text input. The 'Line Item Status' field has a dropdown menu. The 'Submissions' section shows a table with columns for Name, Date Received, and Status. The 'Total: 1' is displayed at the bottom left.

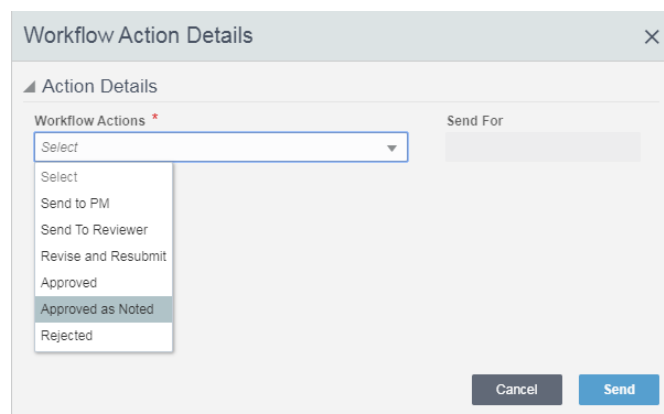
8. Click on General Tab and Go to the right side and fill out the Comments section
 - You can add an attachment here.
 - Then click on “Post”
9. Once everything is filled out, click on “Send” in upper right.
 - a. If there is a problem an error statement will show up, if it does fix the project
 - b. If no problem, Workflow Action Details screen will show up.
 - c. Select Workflow Action and click on “Send”
 - d. If you want to CC you can fill out the CC then click on “Send”



Submittal Response

You will receive an email that a submittal requires your review and it will contain a link

1. Click on the link and it will open up the submittal
2. Click on “Accept”
3. Open the General Form tab and review information
4. Open the Line Item List tab and review information
5. Open the Attachment and/or make Comments
6. Under the field: Line Item Status you are able to provide status
7. Select a Workflow Action



8. Click on Send

